

# Electronic Subcontracting Reporting System (ESRS) Point of Contact Official Guide 1.2

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## 1. Log-In to ESRS

### 1.1 Existing Users

- I. Point your browser to <https://www.esrs.gov/government/>
- II. Login to ESRS by typing your e-mail address and password.
- III. Click "Go"

#### Government Users Login Screen

The screenshot shows the eSRS Government Users Login Screen. The browser window is titled "eSRS Test - Microsoft Internet Explorer". The address bar shows the URL "https://www.esrs.gov/government/". The page header includes the eSRS logo, "Integrated Acquisition Environment", "Electronic Subcontracting Reporting System", and "FOR GOVERNMENT". The date and time are "Thursday, September 8, 2005 | 11:59 am" and "powered by simplicity". The main content area has a "Welcome Government Users" message and tabs for "eSRS Sign-In", "Register", and "Forgot my password". The "eSRS Sign-In" tab is active, showing fields for "Email Address" and "Password", a checkbox for "Keep me logged in on this computer", and a link "Not a government user? Click here.". Below the fields are "Go" and "Reset" buttons. A large blue arrow points to the "Go" button, with the text "III." next to it.

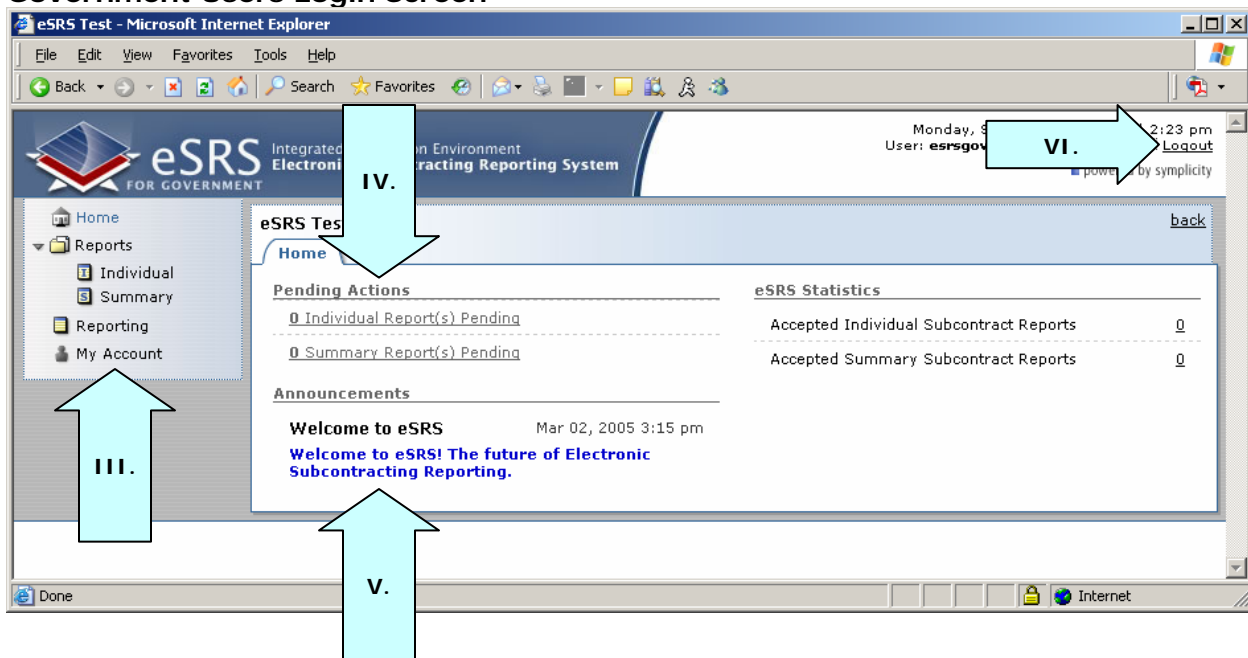
### 1.2 New Users

- I. Point your browser to <https://www.esrs.gov/government/>
- II. Click on the "Register" tab.
- III. Select your Agency.
- IV. Complete the forms, clicking continue after you have completed each section.
- V. At the last step, please review the information, and when ready click "Submit Registration"
- VI. You will receive an e-mail after submitting. Please follow the directions in the e-mail that you receive.
- VII. After confirming your account, you will see an "Account Confirmation Successful" message. You must now wait for approval.
- VIII. Once you are approved, you will be sent another e-mail.
- IX. You may now login to the system by following "Section 1.1, p. 3" of this manual.

## 2. Home


- I. Login to ESRS.
- II. You will be directed to your ESRS homepage. (Depending upon your account, your homepage and navigation menu may appear differently)
- III. On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.
- IV. "Pending Actions" will display all items in the system that your account has access to with the status "pending".
- V. Announcements are created by administrators. For more information on how to create announcements, please review "Section 3" of this manual.
- VI. Finally, when you are done using the system, please click on the "Logout" link on the top of every page.

### Government Users Login Screen

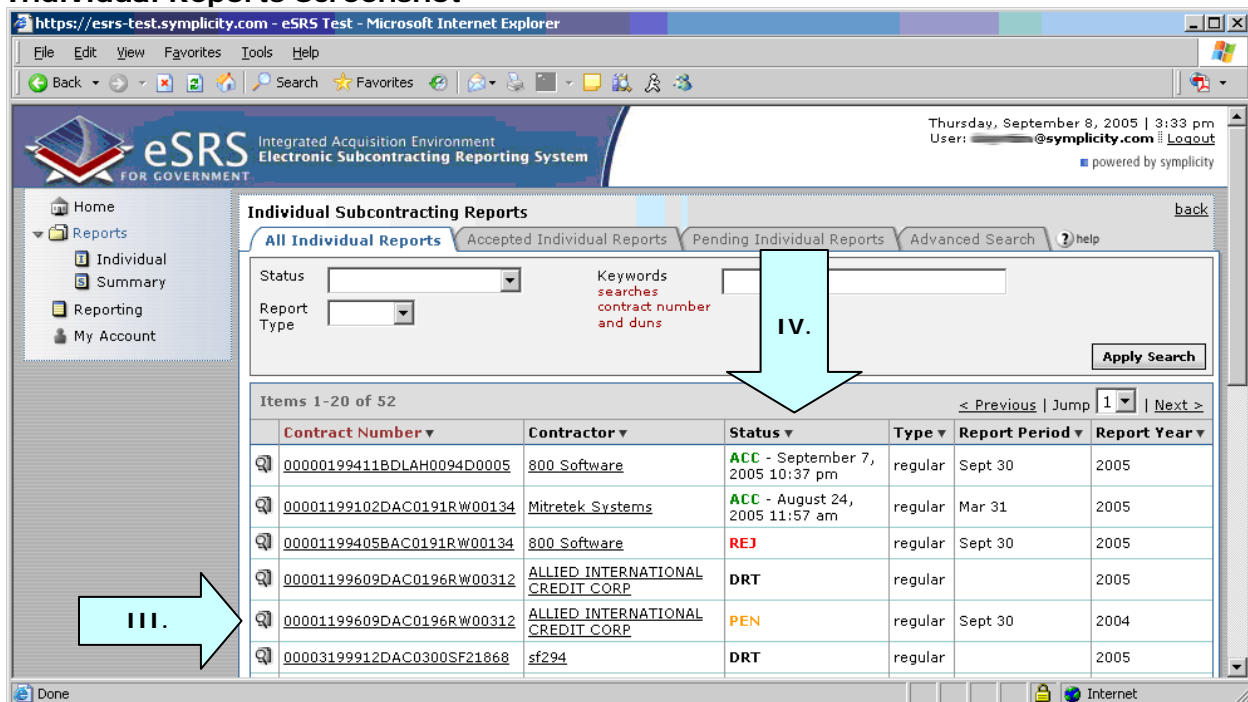


## 3. Reports

### 3.1 Individual

- I. Click on "Reports" and then "Individual" on the left hand navigation menu.
- II. You will see a screen similar to the Individual Reports Screenshot below.
- III. Click on the  View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

### Individual Reports Screenshot



https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Thursday, September 8, 2005 | 3:33 pm  
User: @simplicity.com | Logout  
powered by simplicity

**eSRS** Integrated Acquisition Environment  
FOR GOVERNMENT Electronic Subcontracting Reporting System

Home  
▼ Reports  
    Individual  
    Summary  
Reporting  
My Account







**Individual Subcontracting Reports** back

All Individual Reports Accepted Individual Reports Pending Individual Reports Advanced Search ? help

Status  Keywords   
Report Type  searches contract number and duns


Apply Search

Items 1-20 of 52 < Previous | Jump 1 | Next >

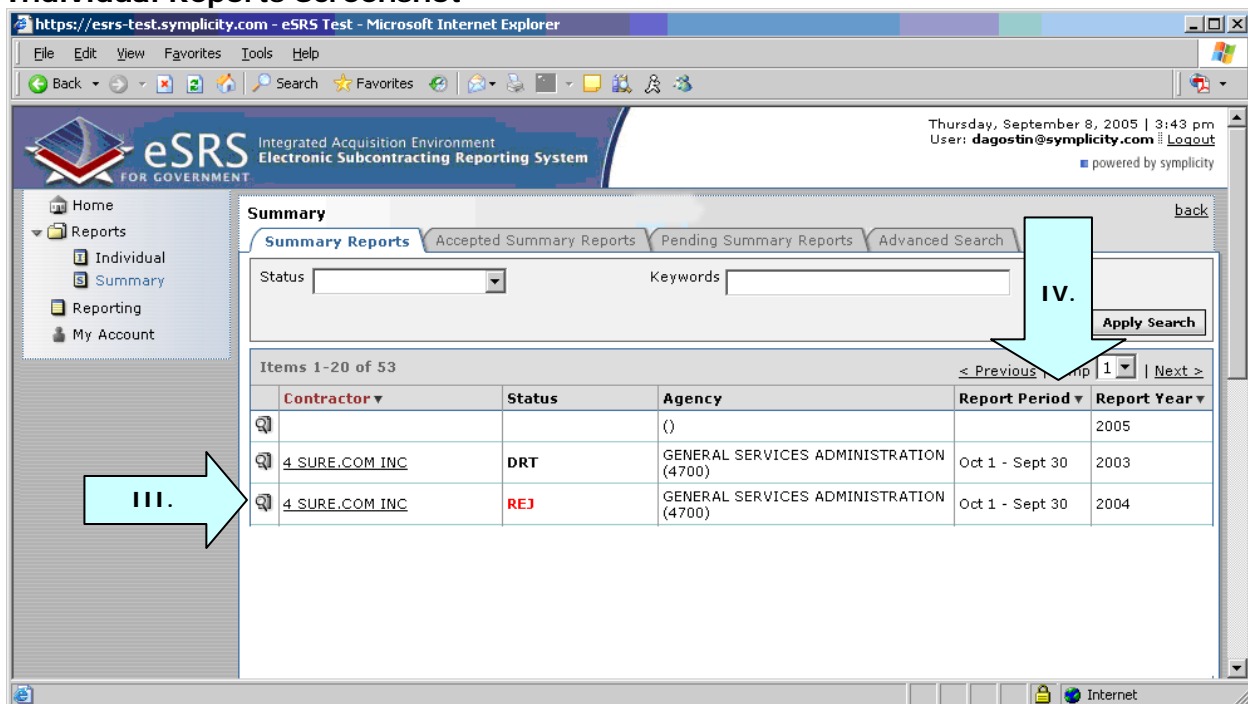
| Contract Number ▼   | Contractor ▼                     | Status ▼                         | Type ▼  | Report Period ▼ | Report Year ▼ |
|---|----------------------------------|----------------------------------|---------|-----------------|---------------|
|  00000199411BDLAH0094D0005 | 800 Software                     | ACC - September 7, 2005 10:37 pm | regular | Sept 30         | 2005          |
|  00001199102DAC0191RW00134 | Mitretek Systems                 | ACC - August 24, 2005 11:57 am   | regular | Mar 31          | 2005          |
|  00001199405BAC0191RW00134 | 800 Software                     | REJ                              | regular | Sept 30         | 2005          |
|  00001199609DAC0196RW00312 | ALLIED INTERNATIONAL CREDIT CORP | DRT                              | regular |                 | 2005          |
|  00001199609DAC0196RW00312 | ALLIED INTERNATIONAL CREDIT CORP | PEN                              | regular | Sept 30         | 2004          |
|  00003199912DAC0300SF21868 | sf294                            | DRT                              | regular |                 | 2005          |

Done Internet

## 3.2 Summary

- I. Click on "Reports" and then "Summary" on the left hand navigation menu.
- II. You will see a screen similar to the Summary Reports Screenshot below.
- III. Click on the  View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

### Individual Reports Screenshot






Summary

Summary Reports Accepted Summary Reports Pending Summary Reports Advanced Search


Status  Keywords

Items 1-20 of 53 < Previous 1 | Next >

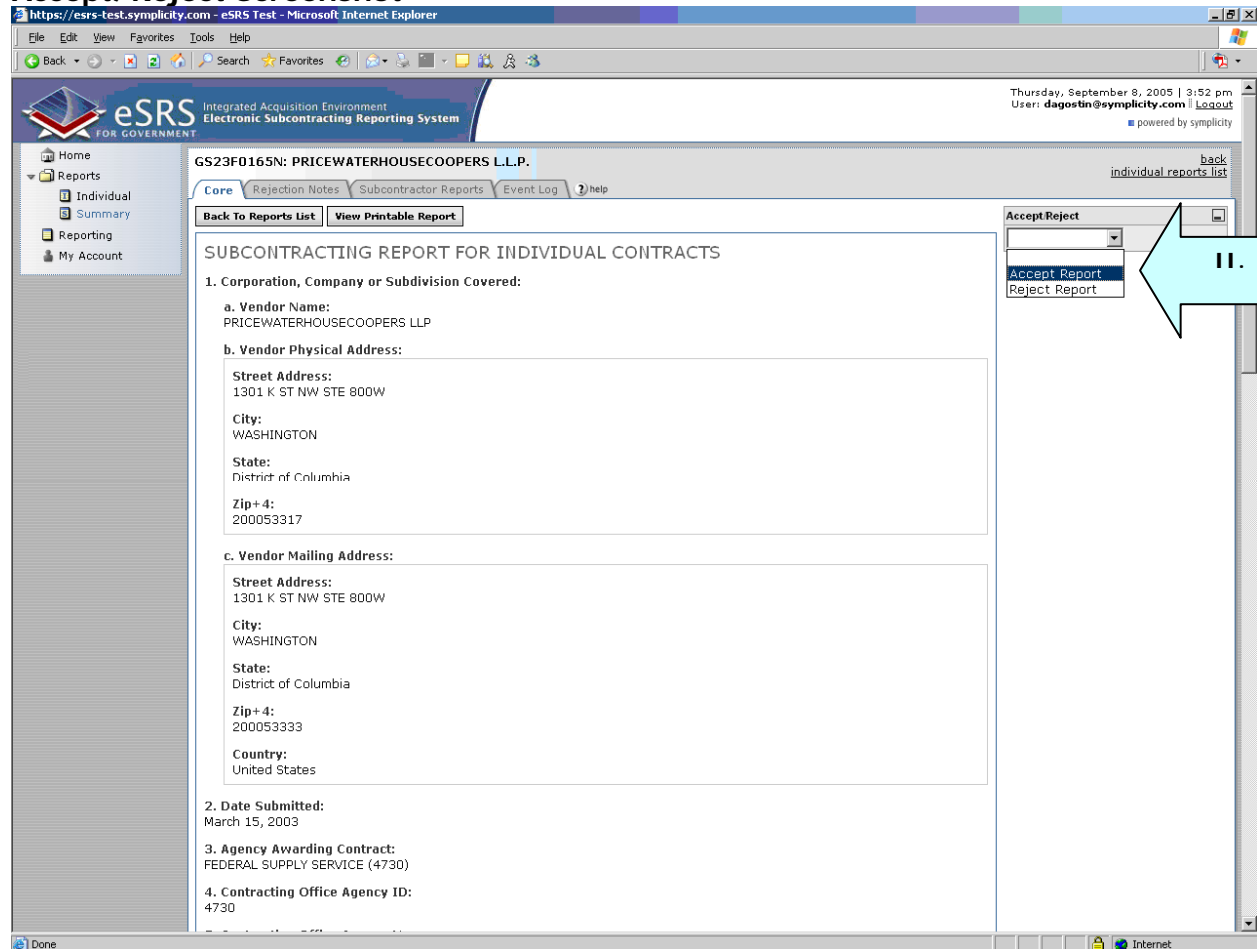
| Contractor ▼   | Status | Agency                                 | Report Period ▼ | Report Year ▼ |
|--|--------|--|-----------------|---------------|
|                 |        | ()                                     |                 | 2005          |
|  4 SURE.COM INC | DRT    | GENERAL SERVICES ADMINISTRATION (4700) | Oct 1 - Sept 30 | 2003          |
|  4 SURE.COM INC | REJ    | GENERAL SERVICES ADMINISTRATION (4700) | Oct 1 - Sept 30 | 2004          |

### 3.3 Accept / Reject

The processes to accept or reject individual and summary reports are the same. To accept or reject, simply go to the section (Individual or Summary) that the report is filed. Click on the "Pending" tab near the top of the screen, and find the report that you would like to accept or reject.

- I. Click on the  View Icon beside the report.
- II. Select Accept Report or Reject Report from the drop down box (See Accept/Reject Screenshot below).
- III. If you accepted the report, you may return to the report list by clicking on the "Back to Reports List" button.
- IV. If you clicked "Reject Report" you will be redirected to a page with a form. Please fill this form out with information why the report was rejected. After completing the form, click "Submit" to finalize the rejection.

#### Accept/Reject Screenshot





The screenshot displays the eSRS web application interface. The browser window shows the URL <https://esrs-test.simplicity.com>. The page title is "eSRS Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "dagostin@simplicity.com". The main content area shows a "SUBCONTRACTING REPORT FOR INDIVIDUAL CONTRACTS" for "GS23F0165N: PRICEWATERHOUSECOOPERS L.L.P.". The report details include:

- 1. Corporation, Company or Subdivision Covered:
  - a. Vendor Name: PRICEWATERHOUSECOOPERS LLP
  - b. Vendor Physical Address:
    - Street Address: 1301 K ST NW STE 800W
    - City: WASHINGTON
    - State: District of Columbia
    - Zip+4: 200053317
  - c. Vendor Mailing Address:
    - Street Address: 1301 K ST NW STE 800W
    - City: WASHINGTON
    - State: District of Columbia
    - Zip+4: 200053333
    - Country: United States
- 2. Date Submitted: March 15, 2003
- 3. Agency Awarding Contract: FEDERAL SUPPLY SERVICE (4730)
- 4. Contracting Office Agency ID: 4730

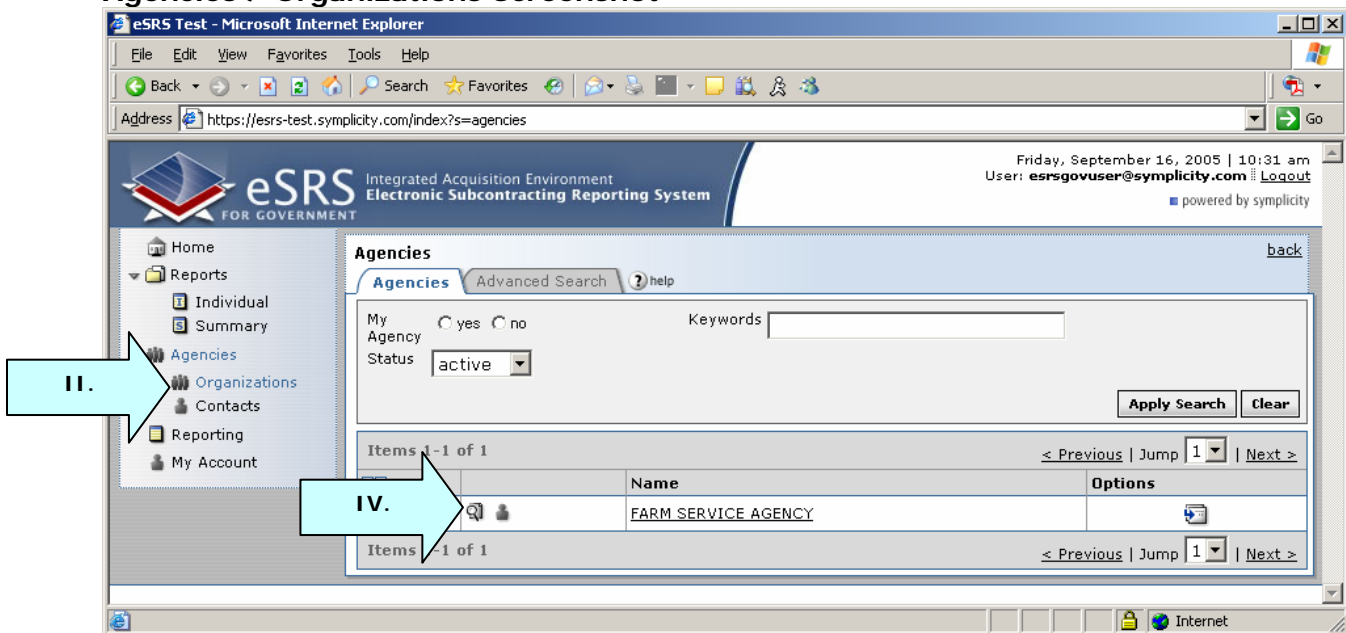
On the right side of the page, there is a dropdown menu labeled "Accept/Reject". The menu is open, showing two options: "Accept Report" and "Reject Report". A red arrow points to the "Accept Report" option, labeled "II.".

## 4. Agencies (Organizations)

### 4.1 Review / View Existing



- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" on the left hand menu.
- III. You will see a screen similar to the "Agencies / Organizations Screenshot" below.
- IV. Click on the  View Icon beside any contractor to see more information pertaining to that specific contractor.
- V. Notice that any child organization will appear below the parent organization and will also have a  to the left of the name.

### Agencies / Organizations Screenshot








## 4.2 Contacts

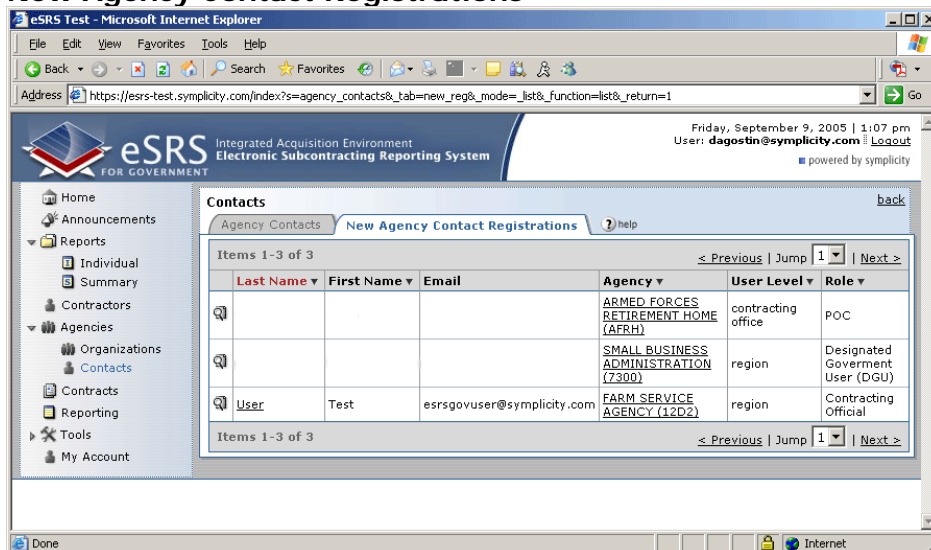
- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Contacts button next to the agency.
- IV. The Contacts for this agency will appear.
- V. You can set a contact as the primary contact by clicking on the "Set Primary" button.
- VI. You may also edit a contact by clicking on the Edit Icon  beside the contact you wish to edit.
- VII. Finally, to send an e-mail to the contacts, put a checkmark beside the contacts you wish to e-mail. Use the "Batch Options" drop down to send an e-mail.
- VIII. For more information, please read Section 7, Contacts.

### 4.3 Approve/Reject Agency Contact Registration

Agency Contact registrations must first be approved before the user can begin using the ESRS system.

- I. On the "Home" page, New Contact Registrations will appear under "Pending Actions" if contacts need approved.
- II. Click on the "New Agency Contact Registrations" link.
- III. You may also click on Agencies and then Contacts on the left hand navigation menu. After clicking on Contacts, Click on the "New Agency Contact Registrations" tab to go to the same place that the Home Page link directs you.
- IV. Click on the  View Icon beside the contact you wish to approve or reject.
- V. Click on  or  to complete the process.

### New Agency Contact Registrations

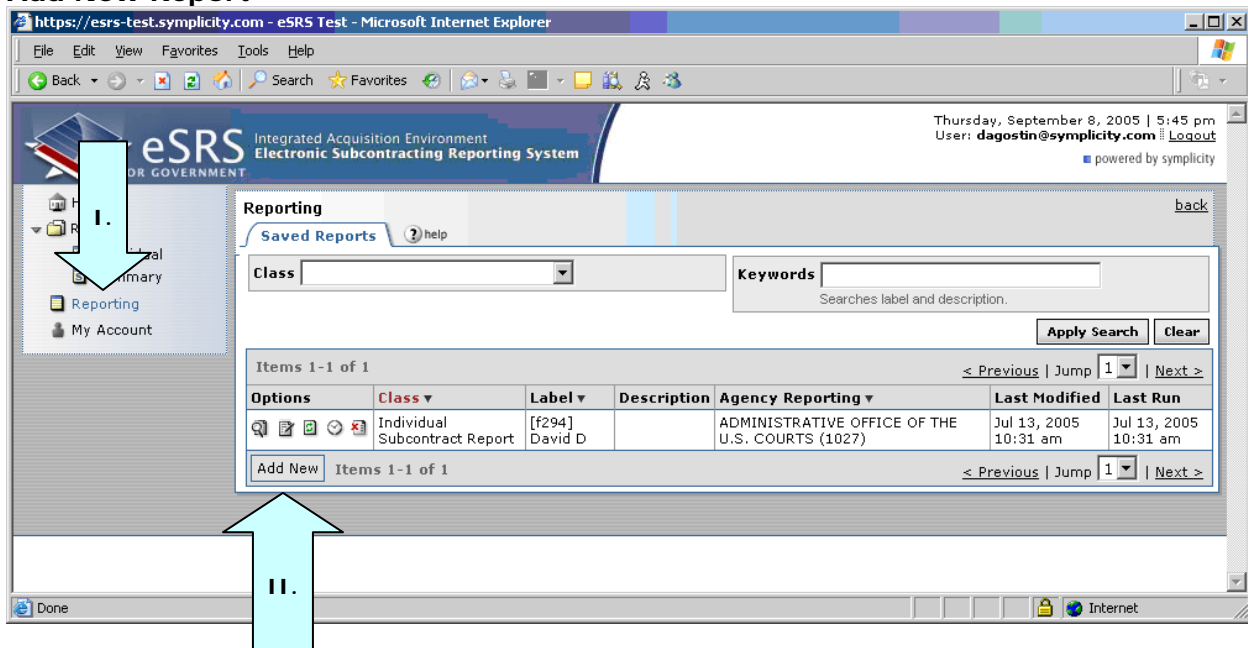


## 5. Reporting

### 5.1 Build New Reports

- I. Create New Report by clicking on REPORTING on the left navigation menu.
- II. Click on Add New

#### Add New Report



- III. Select the basis for your report.
- IV. Click Continue
- V. Before building the report, checkmark the Save As box and input a Name and Description for the Report.
- VI. When updating an existing report, save the report under a different name by check-marking Copy to New Report.
- VII. Select the fields to be included in the report by check-marking specific fields.
- VIII. Narrow the focus of the report by clicking on a Filter link under a particular field.
- IX. Once fields and filters have been assigned, view the report by clicking Submit at the bottom of the page. **NOTE:** Save & return will save change to report builder, but will not run report in order to view it.

## Build a New Report

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Thursday, September 8, 2005 | 5:47 pm  
User: [dagostin@simplicity.com](#) | [Logout](#)  
powered by simplicity

**eSRS** Integrated Acquisition Environment  
Electronic Subcontracting Reporting System  
FOR GOVERNMENT

Home  
Reports  
Individual  
Summary  
Reporting  
My Account

**Reporting** [Previous Versions](#) [Settings](#) [help](#) [back reporting list](#)

Reports will pull from **accepted** Individual Subcontracting Reports from your agency and below. If you would like to filter specific agency/agencies, scroll down to the Contract Related class and choose from the agencies in the select list. If only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their lower-tiers. To limit the results to a specific reporting period, use the "Reporting Period From Inception Of Contract Thru:" filters.

**V.**

☒ **Save as:** [f294] David D  
**Description:**  
☐ **Copy to new report**

**VI.**

**Step 2:** Please select the fields and filters you wish to have included in your report.


**Base Class: Individual Subcontract Report** Count ☒

☒ Contract  
☐ Report Submitted As  
☐ Vendor Name  
☐ Vendor Physical Address  
☐ Vendor Mailing Address  
☐ Date Submitted  
☒ Agency Awarding Contract  
☐ Contracting Office Agency ID  
☐ Contracting Office Agency Name  
☐ Region Code  
☐ Contracting Office ID  
☐ Contracting Office Name  
☐ Funding Agency ID  
☐ Funding Agency Name  
☐ Funding Office ID

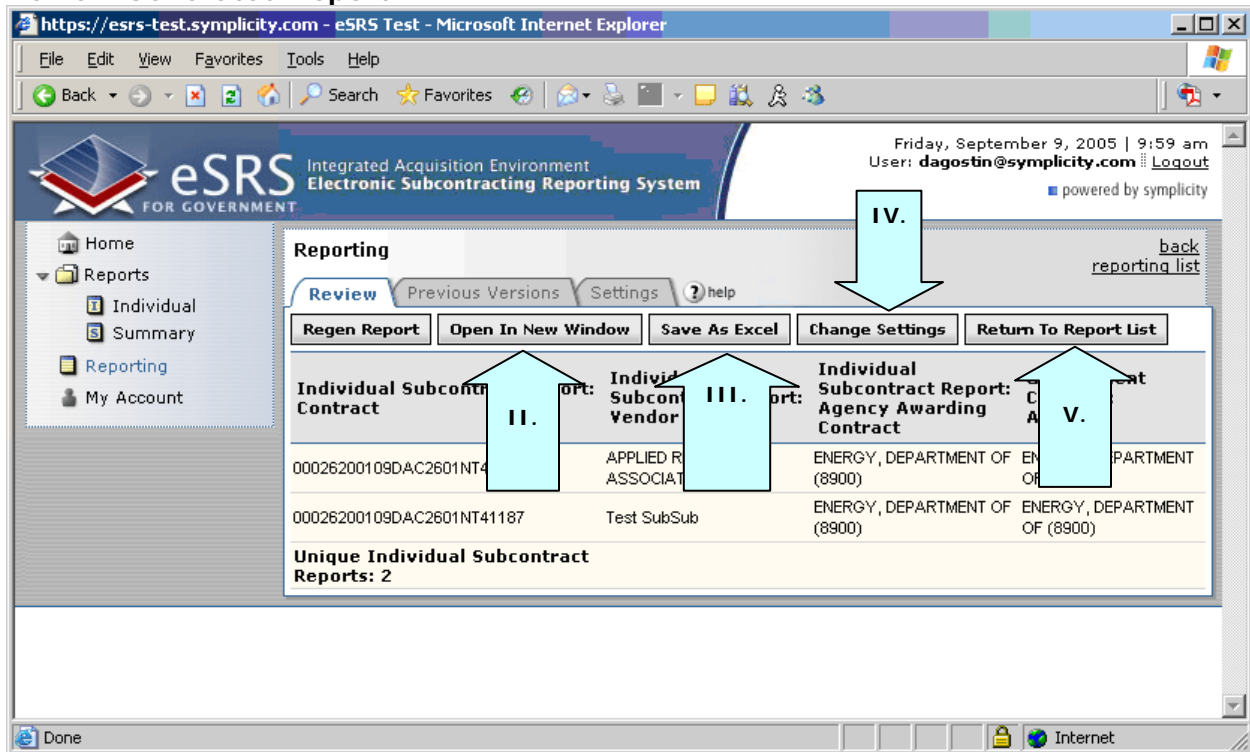
**VII., VIII.**

Done Internet

## 5.2 View Generated Report

- I. Click on the  View Icon beside an existing report.
- II. Show the report in a separate browser by clicking on the Open in New Window button at the top.
- III. Transfer the report into an Excel Workbook by clicking the Save as Excel button.
- IV. Re-configure the report by clicking on Change Settings button at the top.
- V. Go back to the report list by clicking the Return to Report List button.

### Review Generated Report



https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Friday, September 9, 2005 | 9:59 am  
User: [dagostin@simplicity.com](mailto:dagostin@simplicity.com) Logout  
powered by simplicity

**eSRS** Integrated Acquisition Environment  
FOR GOVERNMENT Electronic Subcontracting Reporting System

Home  
Reports  
Individual  
Summary  
Reporting  
My Account

**Reporting**  
Review Previous Versions Settings ? help

Regen Report Open In New Window Save As Excel Change Settings Return To Report List





| Individual Subcontract Contract | Individual Subcontract Vendor | Individual Subcontract Report: Agency Awarding Contract |
|---------------------------------|-------------------------------|---|
| 00026200109DAC2601NT4           | APPLIED R ASSOCIAT            | ENERGY, DEPARTMENT OF EN PARTMENT                       |
| 00026200109DAC2601NT41187       | Test SubSub                   | ENERGY, DEPARTMENT OF ENERGY, DEPARTMENT OF (8900)      |

Unique Individual Subcontract Reports: 2

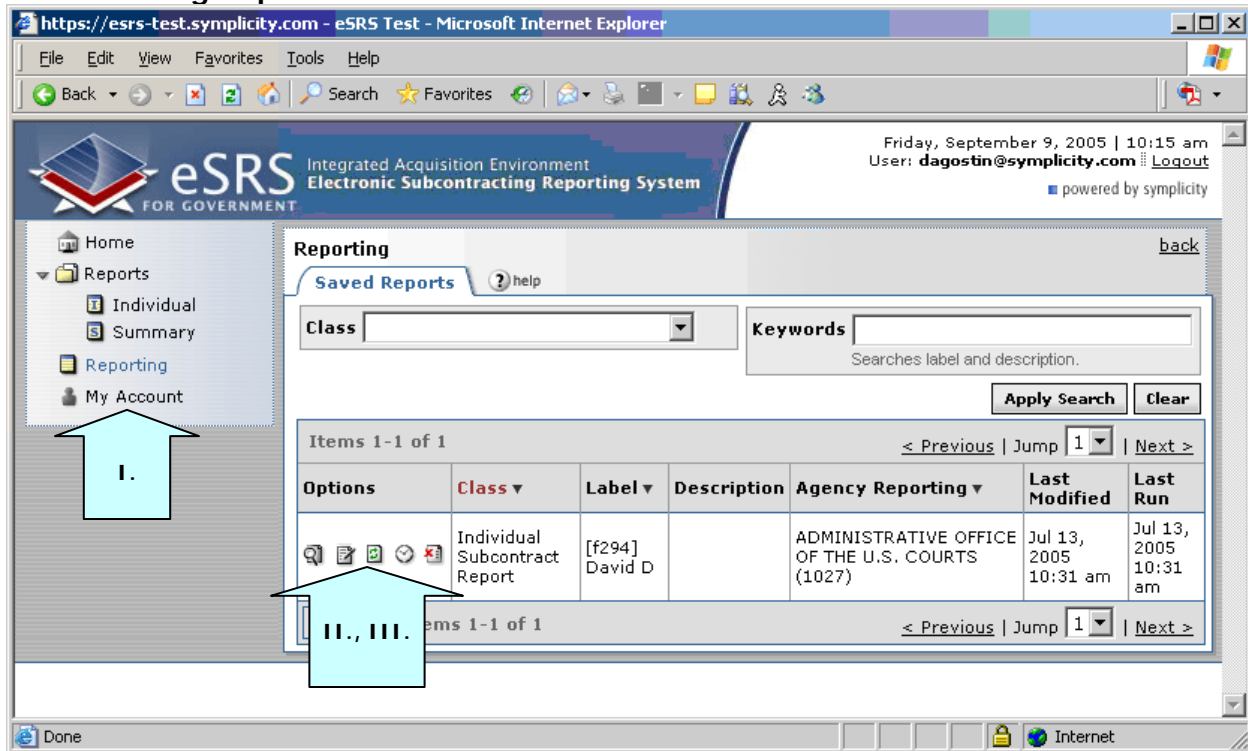
back reporting list

Done Internet

## 5.3 View Existing Reports

- I. View Existing Report by clicking on REPORTING on the left navigation menu.
- II. View Saved Queries/Report on the list.
- III. View , Edit , Re-run , View Previous Results  by clicking on respective icons.





### View Existing Reports



The screenshot shows the eSRS web application interface. The browser address bar displays "https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer". The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "dagostin@simplicity.com" on Friday, September 9, 2005, at 10:15 am.

The left navigation menu has the following items: Home, Reports (expanded), Individual, Summary, Reporting (highlighted with a light blue arrow labeled "I."), and My Account.

The main content area is titled "Reporting" and contains a "Saved Reports" section. It includes a "Class" dropdown menu, a "Keywords" search box, and "Apply Search" and "Clear" buttons. Below the search area, there is a table with the following data:

| Options   | Class                         | Label          | Description | Agency Reporting                                | Last Modified         | Last Run              |
|---|-------------------------------|----------------|-------------|---|-----------------------|-----------------------|
|     | Individual Subcontract Report | [f294] David D |             | ADMINISTRATIVE OFFICE OF THE U.S. COURTS (1027) | Jul 13, 2005 10:31 am | Jul 13, 2005 10:31 am |

A light blue arrow labeled "II., III." points to the "Individual Subcontract Report" entry in the table.

## 6. My Account

### 6.1 General Information

My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

- I. Under Tools, Click on My Account.
- II. Change the fields that you wish to edit.
- III. Click on "Save".

### 6.1 Change Password

- I. Under Tools, Click on My Account.
- II. Click on the password tab.
- III. Enter your new password.
- IV. Click on "Save".

### Password Change Screen

The screenshot displays the 'My Account' page in a web browser. The 'Password' tab is selected, showing a form to change the password. The form includes a 'Save' button at the top left, a 'My Password' section with a red asterisk indicating a required field, and two input fields: 'Enter New Password:' and 'Verify Password:'. A 'Save' button is at the bottom left of the form.